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ABSTRACT

This report addresses itself to an important part of educational planning--community involvement. During the past few years, a variety of techniques has been devised to make citizen participation in the planning process more effective. One technique which has been utilized with considerable success, particularly in the field of education facilities planning, is charrette--a technique for studying educational problems within the context of total community planning needs in a compressed time period. The authors provide a brief introduction to the technique and describe three case studies of its application. They also develop a step-by-step procedure for organizing a charrette. (Authors)

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CHARRETTING THE PLANNING PROCESS

By

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Project Simu-School: Chicago Component

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FOREWORD

Modern-day educational planners face an extremely difficult task of providing quality education to large masses of students in view of decreased revenues, soaring costs, shifting populations and changing educational programs. Such a challenge requires that a far greater emphasis be placed on planning for schools than has been the case to date and necessitates the development of improved techniques specially designed for educational planning.

Project Simu-School is intended to provide an action-oriented organizational and functional framework necessary for tackling the problems of modern-day educational planning. It was conceived by a task force of the National Committee on Architecture for Education of the American Institute of Architects, working in conjunction with the Council of Educational Facility Planners. The national project is comprised of a network of component centers located in different parts of the country.

The main objective of the Chicago component is to develop a Center for Urban Educational Planning designed to bring a variety of people--laymen as well as experts--together in a joint effort to plan for new forms of education in their communities. The Center is intended to serve several different functions including research and development, investigation of alternative strategies in actual planning problems, community involvement, and dissemination of project reports.

This report addresses itself to an important part of educational planning--community involvement. During the past few years, a variety of techniques has been devised to make citizen participation in the planning process more effective. One technique which has been utilized with considerable success, particularly in the field of educational facilities planning, is charrette. On the following pages, Harold L. Cramer and Robert J. Wehking provide a brief introduction to the technique and describe three case studies of its application. They also develop a step-by-step procedure for organizing a charrette. It is hoped that the concepts presented in this report will be of some use to educational planners in their work with community representatives.

Ashraf S. Manji
Project Manager

CHARRETTING THE PLANNING PROCESS

INTRODUCTION - WHAT IS A CHARRETTE?

Two characteristics found in all educational planning Charrettes are involving people and compressing time. The Charrette has emerged as a technique for planning because of the need to involve many people in the planning process and the accompanying need to reduce the time required to arrive at decisions. With set deadlines and intensive activity, the educational facilities planning problems can be studied with a broad involvement of people.

The term "Charrette" is originally from the French word meaning cart. It was first used in reference to planning in the Middle Ages, by Architectural students who worked intensively day and night to complete architectural projects. The students were transported en charette (on the cart) from their dwellings to the university and even as they rode they continued to make final changes on their drawings. After completing training at the university, architects continued to go en charette from their studios to meetings with clients. In time the meaning of charrette was broadened to encompass the period of intensive planning activity which preceded the deadline for presentation of the planning concepts.

It is the intensive activity aspect which applies today to educational facilities planning charrettes. All charrettes are characterized by having a limited amount of time provided for the participants to come to agreement.

There are nearly as many definitions as there are people who use the term. The definition most often used comes to us from the Office of

Construction Services of the U.S. Office of Education. It states that the term "Educational Facilities Planning Charrette" refers to a technique for studying educational facilities problems, within the context of total community planning needs in a compressed time period. In the Charrettes sponsored by the U.S. Office of Education, primary emphasis is given to the educational program and facility as the "Natural Catalyst" for revitalization of the total community.

A more concise definition also coming from the U.S. Office of Education states that the "Charrette" is an intensive, concentrated brainstorming session, deadline oriented, to study educational facilities planning problems within the total community.

A survey of the reports of educational facilities planning Charrettes which have been held in the United States in recent years reveals that all include the following features:

- Involvement of a Relatively Large Number of People
- Devotion of Undivided Attention to the Task
- Provision of a Limited Amount of Time

BRIEF HISTORY OF FACILITY PLANNING

School planning has gone through several stages. During the latter part of the 19th Century, architects became established as school planning experts. Large cities in the eastern part of the country employed staff architects who prepared plans which were used repeatedly. Education was relatively simple and changed very slowly making it possible for an architect, who devoted his full attention to educational buildings, to become well informed and to remain current with changes.

The architect was joined during the first quarter of the 20th Century

by the educator who became expert in part of the planning process. New educational programs were increasing the number of different types of spaces. Educational administrators and college professors became experts in determining how much space was needed for various activities. Most of the first educators who became facility planning experts were finance oriented rather than instructionally oriented and were more administrators than planners.

The U.S. Bureau of Education* Bulletin, published in 1910, contained the suggestion that teachers who are to use a building should be involved in the planning. Very few teachers or instructional supervisors were involved until after World War II, although the suggestion of 1910 would have served as an accurate prediction of what was to happen in school facilities planning forty to fifty years later.

In 1919, in another national publication, the recommendation was made that written educational specifications should be provided for the architect by educators. This too, has proven to be foresighted, for not until the late 1940's were the first "educational specifications" produced, and then only the educational facilities planning "experts" were involved. The first "educational specifications" were little more than a listing of facilities giving the type spaces, the number of spaces and their square footages.

During the 1950's the scope of the educational specifications was expanded to include the number of people who would be using the facilities

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* Forerunner of the Office of Education

and a description of their activities. The trend to include more information in the educational specifications continued in the 1960's. As program offerings expanded and instructional changes became more frequent, it became more difficult for the architects and the educational facilities planning "experts" to remain abreast with the latest developments in all fields, and it became necessary to include more and more instructional specialists in the planning process.

The field of planners has now expanded to include teachers, school service personnel, students, parents, school board members, citizens and others.

In 1900 educational philosophy and educational programs were relatively easy to distinguish. A few learned experts were able to agree upon the broad goals of society and plan the educational programs needed to meet those goals. But society has become more complex and the people less willing to accept and support the decisions of "experts". Democracy today has a broader base of citizens who want to be heard. The need to involve wide representation from the community is urgent if our schools are to serve all citizens and if education is to get support, financial as well as political, from the community.

This need to involve a large number of people (in some cases several hundred), and the mutual need to arrive promptly at decisions which represent a concensus of beliefs, opinions and positions, has brought about the educational facilities planning Charrette.

The year 1969 seems to be significant when discussing the first educational facilities planning Charrettes. The first of the U.S. Office of Education Charrettes was held in February, 1969; the first of the Florida

Department of Education Charrettes occurred in the summer of 1969; and the first of the Montana State University Charrettes was held in September, 1969. In the following pages you will read of these and others too.

CHARRETTES FOR DIFFERENT PURPOSES

Differences in the Charrettes held around the country are mainly the result of applying the process to different situations and for different purposes. The types fall mainly into the following broad categories:

- Identifying Community Goals
- Writing Educational Specifications
- Stimulating Change
- Solving Problems

Most of the Charrettes have more than one of these purposes but to be most productive, the major purpose must be defined and made clear to all participants. The purposes are overlapping rather than distinctly exclusive and it would be possible for a single Charrette to fulfill all purposes to some degree. If a Charrette has more than one purpose, the priorities of importance should be clearly established and stated.

All Charrettes serve the purpose of stimulating change as have facility planning programs over the years. Historically, more sign ficant changes have taken place in education at the time when new facilities were built because the stimulus is offered at that time to reflect upon educational goals and programs. Also, new facilities offer the opportunity to house new programs.

LOCATION OF CHARRETTES

Charrettes have been held in cities such as Baltimore, Indianapolis, Albuquerque, York, Pa., and Bozeman, Montana; in suburbs and rural areas such as Watertown, Massachusetts; Chicoppe, Massachusetts and North Dartmouth Massachusetts; in many school districts in Florida (some city and some rural); on the Gila Indian Reservation at Scaton, Arizona; at Montana State University, Bozeman, Montana; for a parochial school in St. Petersburg, Florida; and on a military base at Ft. Ruker, Alabama. One of the most unique may be a Charrette for the Montana Association of School Administrators to consider financing public schools.

There are no apparent geographical or community type restrictions on Charretting. If you have a planning problem, you can use the process. If you understand the process, your Charrette should be a success.

THE PROCESS

Although educational planning Charrettes have a rather brief history and are varied in purpose and process there are some identifiable steps which occur in most Charrettes. These steps include the following:

- Preplanning
- Selecting Steering Committee
- Orienting and Organizing Steering Committee
- Defining Goals
- Selecting Participants
- Organizing Format
- Scheduling Time
- Selecting Place

- Publicizing Charrette
- Holding Charrette
- Reporting Results
- Following Up

Preplanning

Preplanning is the key to success. If you are considering holding a Charrette you must first define the purposes and the expected results. All steps that follow will be guided by these decisions and with clean definition of purposes and results, the expectations for success are very good. Initiators of a Charrette must at least define tentative purposes and results before the steering committee is appointed although these may be modified later by the steering committee.

The preplanning begins when someone decides that a Charrette may serve the community needs and ends when the Charrette begins. The first task is to become thoroughly familiar with the Charrette process

Selecting Steering Committee

The steering committee will serve during the entire Charrette operation. Members should be selected to represent the major factions in the community which will have interest in the purposes being considered. This should provide two way communication, feeding information from the community in and reporting back to the people who are represented. The mix of membership should be such that decisions represent a consensus of community aspirations.

Consultants from outside the community can serve as both stimulators and levelers. They can bring a broad background of experiences and a viewpoint unbiased by local affiliations. Consultants will be able to suggest for

consideration ideas which might otherwise be overlooked and they can help assure full reviewal of concepts emerging from local members.

The size of the steering committee must be determined by the circumstances and the decision tempered by judgment. As with any group of people, the larger the number the more difficult it is to arrive at decisions, but the broader the representation which is possible. The size must be determined by the number of organizations or community groups to be represented on the steering organization.

Orienting and Organizing

The steering committee should be completely oriented and then organized. A statement of purpose will be communicated to the steering committee members individually before appointment so they may know whether they wish to serve. However, after appointment the entire committee should be thoroughly acquainted with the task assignment and the results expected.

Part of the orientation is getting to know the other Committee members. A temporary chairman may be appointed to conduct the proceedings at the beginning with permanent organization following. This will give committee members an opportunity to get better acquainted and to acquire a clearer knowledge of the tasks, and will also provide a good basis for selecting permanent leadership.

Defining Goals

Following permanent organization the first task of the steering committee is to state the broad goals for the Charrette. The goals are the foundation of the program. If they are clearly defined and meaningful, they will provide a good foundation and if they are poorly stated and senseless, they will fail to provide the basis for a successful Charrette. Participation by many people

who represent the diversities of a community requires the highest level of leadership skill. Everyone involved must have a clear understanding of the expected results. Without good goal definitions participants will certainly be confused, morale will suffer, and the accomplishments will be minimal.

Everyone will not agree fully on each and every goal; and if they do, the committee is probably not representative of the community. The goals should represent a consensus of the views of the steering committee, and if the committee members have been selected well, the goals should also represent a consensus of the view of the community.

Selecting Participants

The next task of the steering committee is the selection of those who will participate. Since committee members are selected because they represent various viewpoints and interests they can help identify others who will make a contribution. The number should be large enough to stimulate critical thought and give representation but be no larger than necessary. Usually the number will range between 50 and 200, although there is no firm guide.

Organizing Format

The format for the Charrette will depend upon type, number of participants, and goals, with goals as the most important. In all cases the format will be designed to create maximum involvement and produce the expected results within the allotted time.

The format must be developed by the steering committee before the Charrette. It can then serve as a guide at the beginning, but be subject to modification during the Charrette. The format will deal with the organization of activities and participants. These activities will include:

- Orienting
- Stimulating
- Discussing
- Reporting
- Finalyzing

Orienting begins before the Charrette. Invitations to take part should include a statement of expected outcomes as well as the schedule. This information is necessary in order for participants to decide whether it is desirable or possible to participate. At the beginning of the Charrette, introductions are made; goals reiterated; and the format presented, explained, discussed and perhaps altered. When this is completed, most of those who are involved should have a reasonably clear idea of what they are trying to do and how they are going to do it.

Stimulating should be interspersed throughout the Charrette and provided primarily by consultants. A massive infusion of unfamiliar concepts may "turn the participants off". A good guide to using stimulation is to use as little as necessary to encourage provocative thought and discussion. Support is always better if ideas are self-initiated and consultants will be most effective if they can stimulate the group to propose and develop their own concepts.

Discussing and reporting are continuous activities which will be carried on daily. Each discussion group should report to the entire Charrette membership and to other citizens who wish to attend reporting sessions on a regular basis. Progress of various groups can then be monitored and results coordinated.

Groups must be organized around discussion topics which are a result of expected outcomes of the Charrette. If the goals include only the setting of broad purposes, the number of groups may be few. If the goals include the writing of educational specifications for a school, the number of working groups will increase. The educational specifications will include at least

a description of the various educational programs to be housed.

Charrette activities must lead to some final conclusions. Hopefully a planning document will be produced containing recommendations which represent a concensus of the opinions of the Charrette participants and can serve as a basis for future action.

Scheduling Time

The steering committee decides how much time to allot for the Charrette and sets the dates. The amount of time will depend upon the purposes of the Charrette and the amount of preparation which can be accomplished before it begins. There must be sufficient time to allow thoughts to emerge and to be thoroughly reviewed, but if there is too much time, participating members will feel they are wasting their time.

If the primary purpose of the Charrette is to identify broad community goals, approximately one full week is needed and in order to get broad community representation, a large number of people must take part. Time must be sufficient to allow everyone to be heard so that the aspirations of all factions can emerge, thought processes evolve, synthesis take place and concensus be reached.

When the Charrette process is used for the purpose of producing educational specifications, the length will vary according to the amount of time and effort expended prior to the Charrette. If broad goals and philosophy are agreed upon before the Charrette, one week should be sufficient. If draft educational specifications are completed, three days may be enough. If educational specifications are completed and the only task remaining is to finalize overall program relationships and a schedule of square footages, one day may be sufficient.

A Charrette organized for the primary purpose of creating conditions favorable for change will require a full week. Many people representing community factions must be involved in order to gain the necessary support to

make any changes which are recommended, and the time must be long enough to allow for the development of ideas.

The length of problem solving Charrettes will depend upon the problem and the number of people involved. In all cases, the amount of time should be determined after the format is developed and will be based upon the activities to be scheduled.

Selecting Place

A school building makes an excellent location for the Charrette, but scheduling may be difficult unless the meetings can be held during school vacation or when classes are not in session. Late afternoons, evenings and Saturdays may be the best time for the participants and to avoid interfering with use of the space for instruction.

If a school can't be made available, keep in mind that you must find a place that has an assembly space large enough for your entire group and others who may wish to attend reporting sessions. Consideration must be given to both the number of groups and the sizes of the groups that will be involved.

Publicizing

Publicizing the Charrette is most important. Representatives of all of the news media in the community should be brought in early and thoroughly oriented, so that when the work is completed the community will be prepared to receive the results, and hopefully, willing to give support. This will be true whether the results require additional money or not. Without community understanding, agreement and support, successful implementation of the resulting goals and programs will probably be headed for useless oblivion or disasterous failure. The public Wants to know; and it distrusts anyone and anything which appears to be less than open.

The leaders and participants should be made aware of the importance of their role to publicize the aims and results of the Charrette to their various

community groups which they represent.

Holding Charrette

After weeks, or perhaps months of preparation, the scheduled Charrette is held. It can be a beautiful experience and usually is if all preparation is done well. The educational planning Charrette is providing a vehicle for bringing people together who have been far apart both physically and philosophically. The confrontations have at times been stormy but the results have always represented a necessary step of progress.

Reporting Results

Plans should be made prior to holding the Charrette for reporting results to the community. A written summary containing recommendations and follow-up plans should be prepared and approved by the steering committee.

In addition to the complete report which is usually rather voluminous, a much shorter summary should be provided which can be reviewed and understood in 15 to 30 minutes and can be economically produced in quantity. The summary should be concise, well organized and well illustrated.

The written report and the summary are communication vehicles. These should be placed in the hands of the news media and community leaders, and given wide dissemination.

Following Up

The Charrette is history; the recommendations are made; the community is aware; and the school board and administration have the report. If the recommendations indicate action, the school leaders will be expected to act.

Otherwise, suspicion and distrust will be the result among those who worked hard to produce the Charrette.

If the Charrette was well organized and participants were representative, the community should support the action. If a vote is required to implement the recommendations, the community should at least have an opportunity to make a decision at the polls.

CASE HISTORY NO.1

In January, 1972 a Charrette was held in a small residential community* in the Northeastern part of the United States. The community is located on the outer suburban belt of a large urban center and the population is made up in part of the remaining older rural residents and present-day oriented citizens.

An ESEA Title III Project was funded in July, 1971 for the purpose of assisting the high school with the process of re-defining its goals. The Charrette was planned as a vehicle for bringing together resources, lay citizens, students and educators. The people involved were interested because the decisions would influence their lives. They also were in positions to contribute support to the activities and programs resulting from the decisions.

Preparation which preceded the Charrette was extensive. The idea for the Charrette came to the staff of the Title III Project from reading several articles about the process. A representative from the U.S. Office of Education then met with the project staff and others, including town officials, to discuss the Charrette process and provide suggestions concerning organization of the Charrette.

The Title III project director served as Charrette coordinator. He established several "task groups", with one person at the head of each group, to begin work during the planning stage.

The coordinator spent a large amount of time over a period of several months in preplanning. He also attended a four-day Charrette held in Western part of the United States. This provided very valuable experience for

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* North Dartmouth, Massachusetts

designing the Charrette and anticipating potential problems which might occur during execution of the program.

The Charrette was well publicized throughout the community. Newspapers carried articles; a local radio station provided several "talk" programs; town officials and educators attended a breakfast orientation meeting; students were informed at a school assembly; posters were displayed; brochures were distributed and ministers informed their congregations.

Participants were selected from a broad base. An invitation to be involved in the Charrette was sent to all staff members of all schools in the district and to over 400 other members of the community. Each of 38 home rooms in the high school selected one person to participate. Lay participants were chosen from the following groups:

- Town officials
- Town meeting members
- Heads of community organizations
- Faculty members and administrators of a local university

Six consultants attended the Charrette. Each was selected on the basis of the relevance of his own experience to the issues under consideration.

The Charrette brought 150 to 200 people together for 30-40 hours during a four day period. The group considered intensively the present state of the high school and identified ways the school and community could become mutually supportive in dealing with social and educational problems.

A large group known as the "core group" was divided into four clusters, each with at least 30 persons. Each cluster was given three classrooms to use so that they might break into smaller sub-groups. Two discussion leaders were assigned to each cluster and two additional leaders served all clusters on a floating basis.

Direction for the discussion groups came from seventeen "charges" which

were prepared by the coordinator. The charges dealt with four elements:

- Curriculum
- Organization and operation of the school
- Social problems within the school and community
- Relationships between the school and community and the use of resources of each.

Some of the charges were assigned to all clusters and some to only one. They were scheduled for consideration. Although the schedule was subject to adjustment as the work progressed, it did set deadlines for task completion.

Each participant was provided with a portfolio of background materials. Two video tapes of the high school in operation were played almost continuously during the Charrette. One hour-long presentation was made by a consultant and this was the only structured large-group activity. As ideas were developed by the clusters, the materials were duplicated and made available to all.

A sixteen member committee was responsible for reviewing recommendations from all clusters and assigning them to appropriate persons or organizations. This committee was self-appointed (four selected by members of each cluster) and self directed.

The Charrette was adjudged a success. Eighty-seven recommendations were produced. Many were not new or radical, but their value came from the support expressed by the community.

CASE HISTORY NO. 2

A state university* in the Rocky Mountain region has held three charrettes. The three were varied regarding objectives and organization. The first lasted ten (10) days and was organized to plan a major building with classroom-office accommodations.

The university architect learned of the Charrette process from a representative of the United States Office of Education. He convinced the members of the administration of the university to sponsor the Charrette with two major goals:

1. To produce a building program in ten (10) days rather than the normal lead time.
2. To involve staff members, students, administrators and lay citizens.

The university architect organized a small but representative steering committee comprised of a staff member, a citizen, a student and the university architect. The steering committee selected charrette participants, set goals, determined the schedule and made decisions concerning numerous other advanced planning details.

The 39 participants included ten (10) students, fourteen (14) faculty/administration members, one (1) state legislator, one (1) interested citizen, four (4) members of the commissioned architectural firm, state and federal officials and consultants.

The charrette was held in a university dormitory where participants "lived" together. Keeping the participants together twenty-four hours a day improved rapport, enhanced communications and provided efficient use of time by

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* Montana State University at Bozeman

eliminating daily travel.

The first two days were utilized by the participants for getting acquainted with each other as well as the assigned task. Presentations were made to the entire group to acquaint them with the philosophy and goals of the university, the programs, the campus and the purpose of the Charrette.

The participants were then organized into 3 working groups. The first task of each team was to develop project concepts and goals. After the common goals were finalized by consensus, the 3 groups worked independently to identify tasks and establish working procedures. They met daily in open meetings to assess progress and to eliminate conflicts. Recommendations were consolidated and presented to the University Building Committee for the purpose of getting the reaction of this decision making body. The report was then finalized.

The second was called a mini-Charrette because it was held during one day and lasted about 12 hours. The purpose was to compress the time normally taken from weeks or months into one day. The task was to decide on the size and arrangement of space which would house the nursing program.

Prior to the Charrette, the objectives and programs had been determined in meetings held over a period of about six months. People with interest in the new nursing facilities were assembled. They reviewed the program and reached a concensus agreement on the space which would be needed.

The third Charrette was held to consider the possible changes in on-campus living patterns which should be considered for planning student residential facilities. The charrette had two objectives: (1) to gather into one document those physical environmental characteristics which students want, and (2) to establish better rapport between administration and students. Prior to organizing the Charrette, a special committee was organized to consider the questions

and after several meetings realized that input was needed from many more people who were involved in on-campus living. They also realized that the various identifiable factors which must be considered are so interrelated that they must be considered together at the same time.

The university administration was presented with the idea of holding a Charrette and accepted with the commitment to carry out the recommendations, insofar as they were feasible.

A steering committee was organized with five (5) members: two (2) students, two (2) administrators and the campus architect. These five plus twenty-one (21) additional persons participated in the two and one-half day Charrette. Eleven (11) of the twenty-six (26) were students and the remaining fifteen (15) were faculty, administrators and architects.

The steering committee organized the Charrette to encourage involvement. Participants were divided into two working groups, and the steering committee presented them with questions to consider. As the Charrette progressed, the two groups met periodically and reached agreement on progress as well as remaining tasks.

All three Charrettes were considered successes. Objectives were met and the university is proceeding with building programs based on the recommendations.

CASE HISTORY NO. 3

A school district* in Northwest Florida held a Charrette in July, 1969. The district, a county with one principal city is located on the Gulf of Mexico and is of medium size with approximately 20,000 students. The purpose of the Charrette was to develop educational specifications for a new middle school.

A consultant from the Florida Department of Education met with the Superintendent and Assistant Superintendent for Instruction in February, 1969, to discuss the idea of holding a Charrette. The secondary supervisor and the elementary supervisor were designated as co-chairmen. A steering committee of eight (8) people, one (1) lay person and seven (7) educators, were selected.

Before the Charrette was held, the steering committee defined the goals which would serve to guide the work of the committees during the Charrette. The steering committee also determined the organization and selected people to serve.

Prior to the Charrette, the consultant from the Department of Education met with all of the Charrette participants to orient them to the tasks required for developing the educational specifications.

Approximately fifty (50) educators from the local school system participated in the Charrette along with school board members, other citizens, students and members of the news media. Fifteen (15) curriculum specialists from the Florida Department of Education were involved as consultants to various committees.

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* Bay County, Florida. Panama City is the major city.

The Charrette lasted five days. It was held during the summer, using facilities at the local community college where participants put in long hours. It was considered a success. The major goal, to produce educational specifications for the new middle school, was met. There was broader community participation in the planning process than had normally been achieved in the past.

During the three years since that first Charrette in July, 1969, the process has been used an additional twenty-five times for planning facilities for elementary, middle, high school, community college, exceptional child education and vocational schools. The process helps reduce the time lag required for producing educational specifications by bringing everyone together for a period of intensive work under conditions which facilitate communications.

The key to success is the preplanning which goes into organizing the people, activities, time and space and orienting the participants prior to holding the Charrette.